SiteManager
Training Manual

Module A
Chapter 1
Contract Administration
Contract Records
Contracts

Section A-1-1-b

Modifying
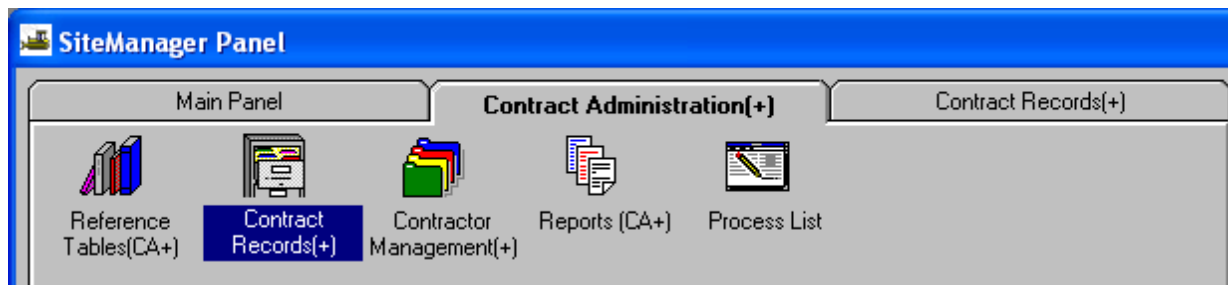# the Contract Window

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Modifying the Contract window in SiteManager

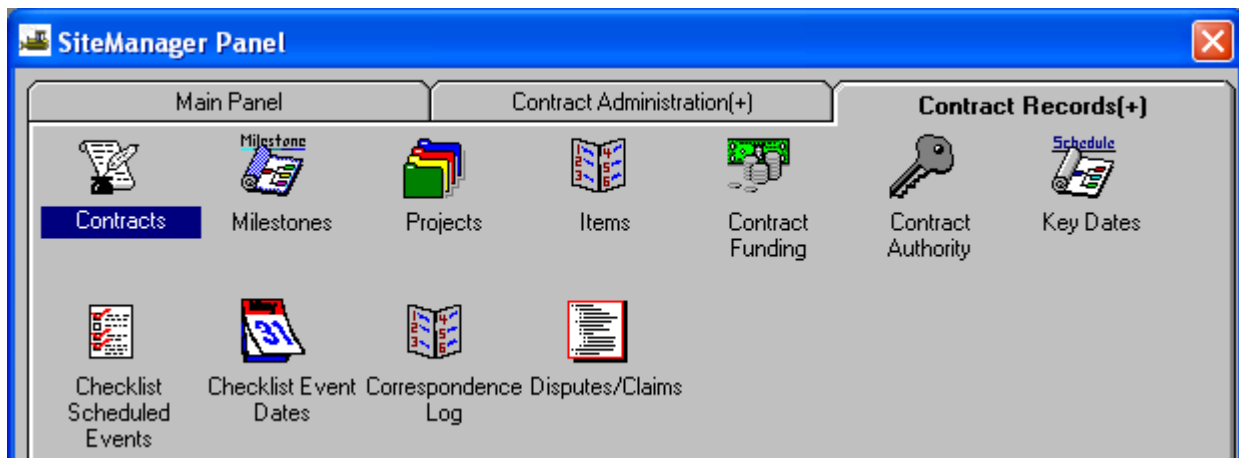The contract window will be modified throughout the contract for the following purposes:

A. Modifying the name of the Generic Fields window (page 3)
B. Changing the retainage percentage (page 4)
C. Entering Critical Date information (page 6)
D. Modifying the contract personnel information (page 10)
E. Change the Prime Contractor when the Prime Contractor has defaulted (page 11)
F. Changing the status of the contract to Complete (page 14)

"Double-click" on **Contract Administration** located on the **Main Panel**.

"Click" on **Contract Records**.

"Double-click" on **Contracts**.

"Click" on the **Open** 📂 button located on the toolbar.

A list of the contracts in SiteManager are listed.
Use the Filter/Find/Sort techniques to locate the appropriate contract.
"Double-click" on the appropriate **Contract ID**.

A. Modifying the Generic Fields window.

"Click" on the **Generic Fields** ▦ icon.

- **Program Budget Manager**: "Enter" the name of the Program Budget Manager in the **Program Budget Manager** field.
- **Project Manager: Project Manager** is the name of the Project Manager for the Contract. Specific messages and reports are sent to this person by the system. "Enter" the name of the **Project Manager** in the **Project Manager** field.
- **Design Firm**: "Enter" the name of the firm who designed the contract in the Design Firm field.
- **CNDT59 – Letter Date of FA Letter**: "Enter" the Final Acceptance letter date.

- **Goal Percent**: "Enter" the goal set for the contract at time of letting if appropriate.
- **Original Commitment Amount**: The amount that the contractor listed on their Affirmative Action Certification in their bid, they were committing to pay the DBE sub. "Enter" the amount, if appropriate.
- **Actual Ending Amount:** The amount that the contractor actually paid the sub. "Enter" the amount, if appropriate.
- **(IN) User Working on Process:** the person who is working on the review of the final. "Enter" the name, if appropriate.
- **Date Cleared:** the date that the DBE Utilization letter was written and sent to Contract. "Enter" the date, if appropriate.
- **Compliance Indicator:** the indicator for final review to know the status of the utilization, whether P for partial, Q for quantities or X fro non-compliance. "Enter" the appropriate indicator, if appropriate.
- **Date 30 Day Notice letter is Sent:** the date the letter of notification to the contractor that they have 30 days to submit DBE-#, MBE/WBE-3 forms. "Enter" the date, if appropriate.

To close this window "Click" the **Generic Fields** button located on the toolbar.

B. Changing the Retainage Percentage

"Click" on the **Payment Data** tab. If the retainage is reduced, "click" in the **Retainage Charges** panel.

"Click" the **New** ⬜ button located on the toolbar to create a new entry.

Work Compl Basis: **Work Compl Basis:** The **Work Compl Basis** indicates the method used for calculating Retainage.
"Select" **WORK IN PLACE** for the **Work Compl Basis** field.

Effect Date: The **Effective Date** is the date the new retainage percentage begins.
"Enter" the date the retainage is reduced in the **Effect Date** field.

Pct: The **Percent** is the retainage percentage to be applied to the Contract.
"Enter" the new retainage percentage in the **Pct** field.

Pct Base: The **Percent Base** indicates that retainage should be calculated as a percentage of the bid amount or the current amount.
Verify Current Amount is selected.

Max Pct: Max Percentage is not utilized by INDOT.

Max Amt: The **Max Amount** field is not utilized by INDOT.

Lump Amt: The **Lump Amt** field is not utilized by INDOT.

Trgr Pct: The **Trigger Percent** field is not utilized by INDOT.

Trgr Base: The **Trigger Base** field is not utilized by INDOT.

"Click" the **Save** button located on the toolbar.

C. Entering Critical Date information

"Click" on the **Critical Dates** tab.

Definitions of Critical Dates:

1. **Accepted Date: Accepted Date** is not utilized by INDOT.
2. **Adjusted Completion Date: Adjusted Completion Date** is calculated by an authorized change order.
3. **Award Date: Award Date** is the date that the contract has been awarded to the contractor.
4. **Checked Out to Field Date:** The Checked Out to Field Date is not utilized by INDOT
5. **Contract Archived Date:** The **Contract Archived Date** is entered by the Contract archival process.
6. **Contractor Bankruptcy Date: Contractor Bankruptcy Date** is the date the contractor's date of bankruptcy.
7. **Contractor Default Date: Contractor Default Date** is the date the prime contractor defaults on the contract.
8. **Final Acceptance Date:** is not utilized by INDOT in this window. Refer to the Key Date window to locate the Final Release date for the contract.
9. **Execution Date: Execution Date** is the same as the **Award Date**.
10. **Letting Date:** is a date that the contract bids are opened.
11. **Notice to Proceed Date:** is a written notice to the contractor to proceed with the contract work.
12. **Open to Unrestricted Traffic Date:** is not utilized by INDOT.
13. **Original Completion Date: Original Completion Date** is the date that the contract is to be completed as per the awarded contract.

14. **Physical Work Complete Date: Physical Work Complete Date** Before entering this date, all Change Orders must be approved or denied. When this date is entered, the system notifies personnel and enters final quantities for active Items and moves all active items to final status. Once this date has been entered and saved, the user will no longer be able to post DWRs on items moved to the Final status.

15. **Price Adjustments Base Date:** is not utilized by INDOT.

16. **Signed Date:** is not utilized by INDOT.

17. **Substantial Completion Date:** field is not utilized by INDOT in this window. Refer to the Key Date window to locate the Substantial Completion date for the contract.

18. **First Day of Work Date:** is not utilized by INDOT in this window. Refer to the Key Date window to locate the First Day of Work date for the contract.

19. **Assign to FieldManager Date:** is not utilized by INDOT.

"Click" on the appropriate **Critical Date Description**.

"Click" in the bottom panel. Verify the **Critical Date Description** is the correct Critical Date.

Actual Occurrence Date: "Enter" the date of the occurrence in the **Actual Occurrence Date** field.

"Click" on the **Save** 💾 button located on the toolbar.

D. Modifying the contract personnel information

"Click" on the **Primary Personnel** tab.

PE/PS: PE/PS is the names of the **Project Engineer/Project Supervisor** for the Contract. Specific messages and reports are sent to this person.
"Enter" the name of the Project Engineer/Supervisor in the **PE/PS** field.

Area Engineer: The **Area Engineer** is the name of the Area Engineer whom the contract is assigned.
"Enter" the name of the Area Engineer in the **Area Engineer** field.

Contract Designer: Contract Designer is the name of the person that designed the Contract.
"Enter" the name of the Contract Designer in the **Contract Designer** field.

"Click" the **Save** 🖫 button located on the toolbar.

## E. Change the Prime Contractor when the Prime Contractor has defaulted

"Click" on the **Prime Contractor** tab.

When the Prime Contractor defaults, a new Prime Contractor is associated to the contract by performing the following steps:

Bankruptcy Date: The **Bankruptcy Date** is the date the Original Prime Contractor's date of Bankruptcy.
"Enter" the date of bankruptcy in the Bankruptcy Date field, if applicable.

"Click" the **Indicator** check-box located in the **Defaulted** box.
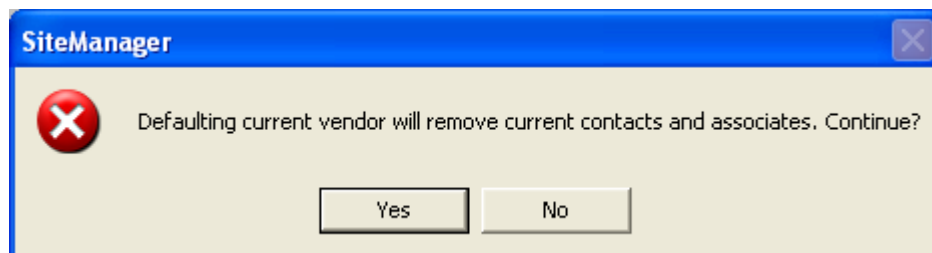
"Click" **Yes**.

Reason: **Reason** is the reason the original Prime Contractor defaulted.
"Click" the Reason drop-down list.
"Click" on the appropriate Reason, if applicable.

Current Prime: The new **Prime Contractor** will be entered in the **Current Prime** field.
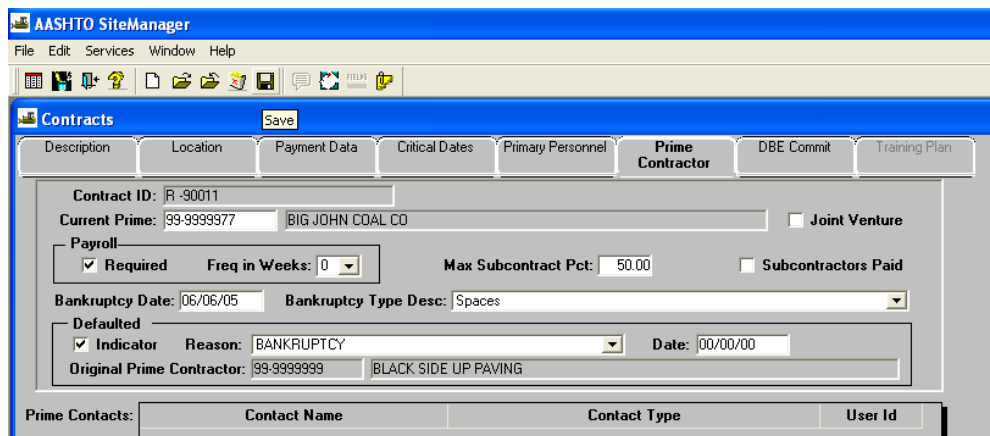"Right-click" in the **Current Prime** field.
"Click" on **Search**.
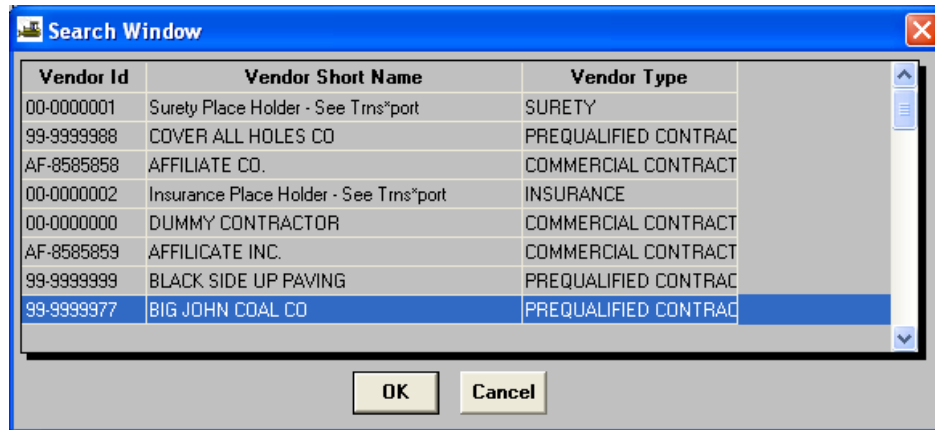
Use the Filter, Find or Search technique to locate the appropriate Vendor ID of the new Prime Contractor.

"Double-click" on the appropriate **Vendor ID.**

"Click" the **Save** 🖫 button located on the toolbar.

F. Changing the status of the contract to Complete

Before changing the status of a contract to complete, the following must occur:
- The Physical Work Complete Date in the Critical Dates tab must have an Actual Date.
- All Critical Dates and Key Dates marked 'Required to Finalize' must have Actual Dates.
- All Checklist Scheduled Events must have Actual Dates.
- All Items must have approved final quantity.
- No Change Order can have a status of pending.
- All Progress and Final Estimates must be paid.
- All Disputes and Claims must be resolved.

"Click" on the **Description** tab.

When the contract is ready to be completed, "click" on the **Status** drop-down list. "Select" **Complete**.

 NOTE: the Actual Date field for **Physical Work Complete Date** in the **Critical Dates** tab of the **Contracts** window must be populated prior to changing the **Status** to **Complete**.

"Click" the **Save** ![save icon] button located on the toolbar.

Note: This error message can indicate that the Physical Work Complete Date has not been populate in the Critical Dates tab of the Contracts window.

"Click" Ok.

"Click" the **Close** button located on the toolbar.

Modifying the Contracts Window

A-1-1-b Group Exercise

The Project Manager has changed to Doloris N. Sents for Contract R -90003.
Modify the Contract window accordingly.

Log into SiteManager as: <u>update</u>
Password: <u>pass</u>

"Double-click" Contract Administration (+) icon.
"Double-click" Contract Records (+) icon.
"Double-click" Contract icon.

Click the Open button
Select   Contract ID: R -90003

Click the Generic Field button located on the toolbar.
Program Budget Manager   <u>Doloris N. Sents</u>
Click the Generic Field button located on the toolbar.
Click Save